

VIDEO STORYBOARD TESTS

CommercialBreak

Tracks Consumers' Response to Current Advertising

MAY 1991 VOL. 3 NO. 2

Print: The Old Reliable Medium

During the past five years, while retention of outstanding television campaigns has steadily declined (except 1987, when the introduction of the California Raisins campaign resulted in a slight increase), the retention of print campaigns has been relatively stable (see Page 2). Print doesn't have quite the impact of television, but the gap seems to be narrowing. Three factors appear to be contributing to this shift.

Viewership of broadcast television is sinking fast in the face of alternatives such as cable and pre-recorded videocassettes. As shares decline, so does viewership and, consequently, retention of broadcast spots. The print media, on the other hand, hasn't experienced anywhere near the same magnitude of audience loss.

In recent years as well, print has been more innovative in developing new ways to attract and hold reader attention. It has been able to adapt to the needs of advertisers with 3-D ads, unconventional multiple-page configurations, ink-jetting, sample strips and many other techniques. By comparison, broadcast television is an ad medium of time restraints—be it :60s, :30s or :15s—and commercials have to fit these delineations without any great flexibility within the medium.

Growing segmentation of print media is also helping retention of print campaigns. The massive universe of publications that target specific audiences and interests has allowed advertisers to position their messages in environments where they'll get the highest degree of attention.

The big change in 1990's Top 10 Print Campaigns list versus 1989 is the disappearance of the three major discount merchandisers—Sears, JC Penney and K mart—that were ranked for the first time ever. Following Sears' lead in Spring 1989

(Continued on Page 6)

Top 10 Print Campaigns of 1990

1990 RANK	1989 RANK	BRAND (Agency)	SEE STORY ON PAGE...
1	4	Nike (Wieden & Kennedy)	1
2	1	Calvin Klein (CRK Advertising)	1
3	2	Camel (Young & Rubicam)	3
4	8	Revlon (Tarlow Advertising)	3
5	11-20	Absolut (TBWA)	4
6	11-20	Infiniti (HHCC)	4
7	5	Marlboro (Leo Burnett)	4
8	21-30	Guess Jeans (In-House)	5
9	7	Ford (JWT/WRG)	5
10	11-20	Maybelline (Lintas)	5

Source: Video Storyboard Tests, Inc. Survey of 24,000 Readers

1

NIKE •Wieden & Kennedy

The story told at Wieden & Kennedy is that, in the early 1980s when the agency was producing award-winning print campaigns for Nike, the client wondered: "Of course they can do print, but can they do television?" and shifted the account to Chiat/Day. With Nike now back at W&D, which has created a string of highly-retained spots that have made the athletic footwear marketer a regular on the Top 10 TV Campaigns list, the client reportedly asked: "Of course they can do television, but can they do print?" The answer is an unequivocal "yes," given Nike's status as the #1 print campaign of 1990.

In the eight-year history of this list, Nike is one of only two advertisers that can boast having Top 10 print and tv campaigns at the same time. A good part of Nike's success in print has to do with the direct translation of some of the highly-visible elements (e.g., Bo Jackson, Michael Jordan, "Just Do It") from its commercials to paper.

Even more important is the agency's philosophy of treating print like television. So, like the tv campaign, the Nike print effort features some executions that focus on product, some that are image-oriented and some that are hybrid. All told in 1990, more than 100 different print executions were produced, including five inserts.

Michael Jordan and the tagline "Just Do It" are the elements most often recalled by readers about Nike print ads. Other athletes mentioned by name include Bo Jackson and Andre Agassi. Not surprisingly, there's greater retention of these celebrity jocks by readers interested in sports.

Also retained by respondents are the graphics featured in Nike ads. The different styles of shoes shown are cited as attention-getting. Readers also describe the company's executions as "creative" and "neat."

Best recalled of Nike's 1990 print line-up were the "Things They Might Have Said But Never Did" insert, "You Were Born A Daughter" insert, "Neon Colors" insert and gatefold introducing the "180 Shoc."

2

CALVIN KLEIN •CRK Advertising

After occupying the #1 slot on the Top 10 Print Campaigns list for five consecutive years, Calvin Klein was unseated in 1990. Of the several print ads that the brand runs for a variety of products, the best recalled are those for Obsession perfume, Eternity cologne and jeans.

The element best retained by readers about Klein executions is the scantily-clad models. "Sexy" is frequently used to describe

(Continued on Page 3)

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Top 1990 Print Campaigns 11 - 50 (In alpha order within quintile)

11-20		31-40	
Bennetton	Kraft	American Express	LA Gear
Budweiser	Prtmr Drug-Free Amer	BMW	Levi's
Chevrolet	Pepsi	Cover Girl	L'Oreal
Chrysler	Sears	Disney	Tide
Estee Lauder	Virginia Slims	K mart	Toyota
21-30		41-50	
Clairol	Kodak	Acura	Lexus
Coca-Cola	Lancome	AT&T	Luvs
Hersheys	Passion	Avon	McDonald's
Honda	Reebok	Better Homes & Gardens	Max Factor
JC Penney	Sports Illustrated	Buick	Weight Watchers

Source: VST Survey of 24,000 Readers

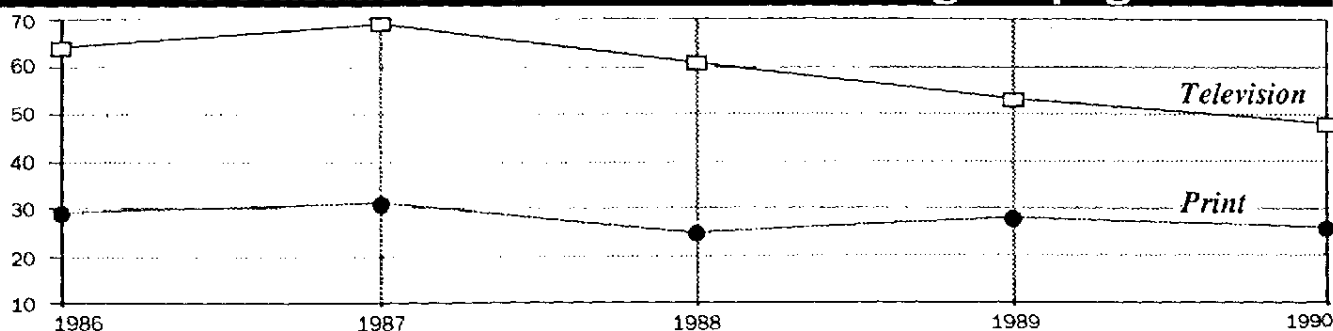
FOOTNOTE TO TOP 50 CAMPAIGNS LIST: This is only the third year we've published a list of Outstanding Print Campaigns 11-50 in conjunction with our annual Top 10 ranking. Because of inherent statistical error in even our survey sample size of 24,000, we cannot assign specific rankings to individual campaigns. Instead, we have arranged them in alphabetical order within quintiles.

Outstanding Print Campaigns of the Previous Five Years

1985	1986	1987	1988	1989
1. Calvin Klein	1. Calvin Klein	1. Calvin Klein	1. Calvin Klein	1. Calvin Klein
2. Marlboro	2. Marlboro	2. Marlboro	2. Revlon*	2. Camel
3. Revlon	3. Ford	3. Ford	3. Marlboro	3. Sears*
4. Maybelline	4. Maybelline	4. Virginia Slims	4. Maybelline	4. Nike*
5. Ford	5. IBM	5. Guess Jeans*	5. Camel*	5. Marlboro
6. IBM	6. Virginia Slims	6. Bud Light*	6. Ford	6. Ford
7. Virginia Slims	7. Revlon	7. Maybelline	7. Virginia Slims	7. Estee Lauder
8. Estee Lauder*	8. Porsche*	8. Sports Illustr.*	8. Passion*	8. Revlon
9. Carlton*	9. Transamerica*	9. Chevrolet	9. Estee Lauder*	9. JC Penney*
10. Apple Comput.	10. Chevrolet*	10. Nike*	10. deBeers*	10. K mart*

*Indicates print advertising campaigns that were not in the Top 10 in the previous year. The Annual Top 10 Print Campaigns list was launched in 1983. (Source: VST)

% of Consumers Who Named An Outstanding Campaign



On a long-term trend basis, retention of television advertising experienced a steep decline in the past five years, while retention of print advertising remained more or less stable. Using 1986 as a base, the percentage of viewers who could recall an outstanding tv campaign dropped one-fourth by 1990, compared to a modest 2-point decline for print ads.

1990's Top 10 Print Campaigns...continued from Page 1

both the models and the ads. While overall consumer response to this sensual sell is positive (e.g., "tasteful nudity," "tastefully done"), some readers were shocked by what they see as blatant exhibitionism.

The majority of readers, however, agree that the mysterious nature of Klein ads make them attention-getting. Whether they regard them as art, provocative, off-the-wall, weird or gross, respondents resoundingly credit Klein print ads for being bold and different.

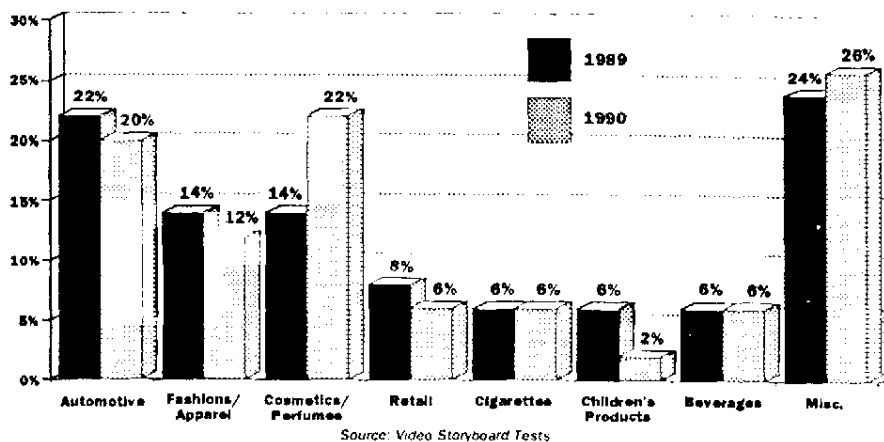
Frequently cited as the outstanding element of these executions is the black and white photography, which readers recall as being aesthetically pleasing and classy. Also singled out were the layouts.

The inclusion of fragrance strips in several Klein executions was noticed by readers, a number of whom mentioned the great scent as the reason their attention was drawn to the ads. After perfumes, the only product-related messages recalled by readers about Klein advertising were the "great looking pants" and the "new line of clothes."

3**CAMEL**
•Young & Rubicam

Now in its third year, Camel's Joe Smooth campaign dropped one notch in the Top 10 Print Campaigns rankings. Besides using several executions carried over from '89, the campaign added a number of new treatments in 1990, including: Hammock, Piano Player, Sail Boat and Motorcycle. As the year drew to a close, executions with a blues music theme were added to promote a variety of hard packs. (Although Camels have been available in hard packs since 1975, this constituted the first time this packaging had been advertised.) In November, an eight-page supplement ran in which Joe Camel was heralded as the "Ambassador of Smoking" and "Character of the Year."

According to published statistics, the campaign increased Camel's brand share from 3.9% in 1989 to 4.3% in 1990—a 10% increase. But even more impressive is the advertising's tremendous success in repositioning an 80 year-old brand which was plagued with a strong image as being a "harsh" smoke. The Smooth Character has

**COMPOSITION OF TOP 50 PRINT CAMPAIGNS ('90 vs '89):
COSMETICS/PERFUMES MAKE A COMEBACK**

enhanced perception of the cigarette's taste, which, research shows, is actually described by converts as being a lot smoother than the old image implied.

Joe Smooth, the suave, human-like dromedary featured in the campaign, is the primary reason readers recall Camel ads. He is described as likeable, unique and unusual and the element that makes this brand stand out from the rest of the pack. Overall, the executions are considered funny, colorful, well-organized and realistic.

4**REVLON**
•Tarlow Advertising

Also in its third year, Revlon's "Unforgettable Women" print campaign has worked its way back up the Top 10 list after debuting in the #2 slot in 1988 followed by a drop to #8 in 1989. Helping its launch in '88 was the appearance of major celebrities such as Liza Minnelli, Brooke Shields and Oprah Winfrey. The campaign lost ground the following year when fewer stars were used.

In 1990, the focus shifted to the product itself. Celebrities were replaced by models and eight executions—including two 8-page gatefolds—were produced. According to the advertiser, all Revlon products that used this product-oriented format chalked-up record sales in 1990.

Revlon ads are noticed first for their colors, specifically those of the featured products (e.g., nail polish, lipstick, eye make-

up). Expanded product displays in the ads underscore the message that an extensive selection of colors are available.

A close second to color in boosting awareness and retention of Revlon print ads is the models. Some readers specifically cited Cindy Crawford, who appeared in a majority of executions, while most recalled them

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**HOW THIS TOP 10 LIST
IS COMPILED**

Video Storyboard Tests' Eighth Annual Top 10 Print Campaigns list is the result of its ongoing testing and tracking of advertising. In 1990, VST interviewed more than 24,000 consumers in shopping malls throughout the nation. This annual list is based on responses to two questions: "Think of all the ads you've seen in magazines and newspapers in the past four weeks. Which one do you consider most outstanding?" and "What was outstanding about this ad?"

Based on top-of-mind recall, this list is biased heavily toward national advertisers. Therefore, any print advertising campaign that breaks through with a comparatively small budget (e.g., Guess Jeans) deserves extra acclaim.

In addition to being influenced by the pervasiveness of the campaign, the list also measures awareness (have seen the ad and can correctly identify the brand) and acceptance (have a positive opinion of the ad).

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1990's Top 10 Print Campaigns...continued

in generic terms as striking, wholesome and lovely. "They give a personal touch to the product," observed one respondent, referring to Revlon's practice of printing the models' names in their ads.

Photography and layout were frequently mentioned as outstanding and attention-getting elements of the campaign.

5**ABSOLUT
•TBWA**

The 10 year-old Absolut vodka campaign, winner of more awards than any other effort in the history of print advertising, is finally hitting home with viewers. Its entry into the Top 10 makes it the first liquor campaign ever to earn a spot on this list. And it accomplished this without the benefit of any carryover from television, unlike many of the top-ranking print campaigns.

The campaign that plays off Absolut's name and the shape of its bottle has helped the brand's share mushroom to 60% since its introduction in the U.S. Each year, an average of 40 executions are added to the campaign and more than 1,000 magazine insertions are made. New ads in 1990 included Absolut San Francisco, Absolut Peak, Absolut Definition and Absolut Kosher.

The campaign's objective is to position Absolut as the finest imported vodka avail-

able by appealing to the sophisticated, status-conscious consumer. The clear glass bottle is used to both convey the purity of the product and act as a readily identifiable symbol that reinforces brand awareness. Each execution is tailored to the audience of the magazine it's running in so readers can clearly identify with the message.

Retention of the overall Absolut campaign is far greater than that for any of the brand's individual executions, suggesting cumulative awareness over the course of the past decade. Among those specific ads best recalled by viewers were "Absolut Manhattan" (a 1989 execution), followed by "Absolut 3-D" and "Absolut Subliminal."

6**INFINITI
•HHCC**

To capture immediate attention for its new nameplate, Infiniti unveiled an offbeat pre-launch print campaign ("Rocks and Trees") in Fall 1989 that was totally devoid of cars. The unconventional nature of this campaign created enough viewer awareness to make it a Top 20 ranking on that year's annual list.

In the first quarter of 1990, a new print effort ("Post Launch") debuted in which the car was revealed, although nature continued to play a major role—this time as a background element.

This campaign for Infiniti's Q45 and M30 models included three four-page executions and five spreads. It ran until September with the dual goals of building the image of Infiniti as a luxury nameplate as well as promoting the attributes of the two models.

While research conducted in mid-year showed that consumer perception of Infiniti as a luxury vehicle was on a par with Mercedes and Lexus, awareness of specific features was still low. As a result, a features-oriented campaign for the 1991 line (Q45 and the new G20) took flight in September with five multi-page units. This reconfigured campaign, which doesn't use headlines and taglines, will run through September 1991.

Infiniti occupies a higher berth on 1990's Top 10 Print Campaigns list than Ford, which had always been the top-rated automotive campaign before this.

The pre-launch campaign was recalled by readers for its "lively scenery," "peace," "abstract" quality and "simplicity." And many say they were impressed by the post-launch campaign's layouts which communicated the quality and beauty of the car.

The third leg of the campaign, which kicked-off the '91 model year, was regarded as informative by consumers who now wanted specific information after one of the longest build-ups in the annals of marketing.

7**MARLBORO
•Leo Burnett**

Now in its 28th year, the Marlboro Man campaign continued its decline on the Top 10 Print Campaigns list. It last rode high in the saddle in 1984, losing its #1 ranking the following year to Calvin Klein. Despite this slide, Marlboro remains the best-selling cigarette brand in the world. (Virginia Slims, another Philip Morris/Leo Burnett brand that made every Top 10 print list through 1988, was unranked for the second consecutive year.)

Shrinking retention of the Marlboro Man has caused both the advertiser and its agency to do some serious soul-searching. Proponents of retiring the campaign argue that it has become a cliché and isn't really under-

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Nike became the only campaign to simultaneously have high-ranking Top 10 print and tv executions



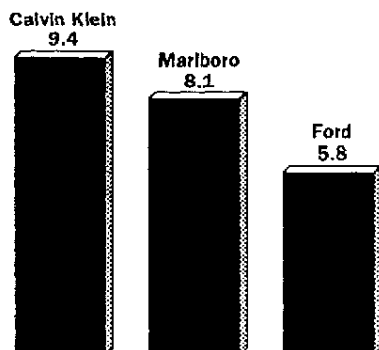
Repeatedly honored by the ad community, Absolut finally earned a Top 10 ranking from consumers

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1990's Top 10 Print Campaigns...continued

AVERAGE SCORE OF CAMPAIGNS THAT HAVE BEEN IN TOP 10 FOR THE PAST 8 YEARS

(#1 Ranking=10 pts; #2=9 pts; etc.)



Source: Video Storyboard Tests

stood overseas, where most cigarette sales growth is now taking place. Advocates for preserving the campaign, on the other hand, ask: "why tinker with success?"

The campaign's best-retained element, not surprisingly, is the Marlboro Man—typically a lone cowboy, although some past executions have featured several. This rugged-looking individualist has come to symbolize the brand to readers, who generally perceive him as "attractive" and "sexy."

The cowboy's horse is the other element recalled most by readers., who closely associate the cowboy and his steed. In fact, respondents frequently say they remember seeing the horse, even if it didn't appear in a particular execution.

There is also high retention of the scenic backgrounds featured in the ads. Readers describe the full-flavor Marlboro settings as "rugged" and those for the low-nicotine version as "peaceful" and "calm."

8

GUESS JEANS
•In-House

The fashion company makes its first-ever appearance on the Top 10 print list with a campaign that encompassed almost 20 executions for seven different product lines: juniors, men, kids, fragrances, footwear, watches and mixwear. But the major focus was on juniors.

Featuring its exclusive (and highly-publi-

cized) model Claudia Schiffer, Guess' juniors effort consisted of a series of ads shot in Paris, Italy, Morocco and Arizona. A four-page insert photographed in Greece appeared in more than half a dozen magazines.

In several surveys conducted among teenagers, Guess emerges as the most widely-owned and preferred brand of jeans. But, now in its 10th year, the brand recognizes that its core audience is getting older. Consequently, designer Georges Marciano has developed a new career-type collection for these consumers for 1991 and a campaign to reach this evolving audience has also taken shape. A new model, Shana, has replaced Schiffer in the company's juniors ads.

More than anything else, Guess Jeans print executions are retained for their glamorous models striking dramatic poses. After that, they're remembered for their grainy B&W photography and featured products.

9

FORD
•JWT/WRG

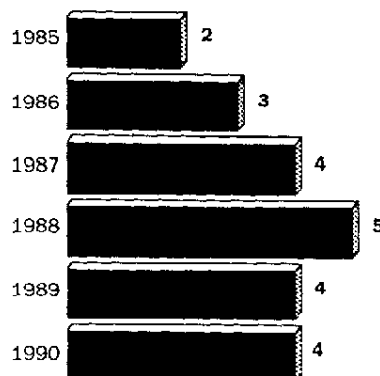
Ford is one of only three print campaigns that have been ranked in the Top 10 for each of the eight years this list has existed. Its 1990 ranking is its lowest ever.

Compared to the other major automakers, Ford has the most consistent print advertising. Its umbrella campaign featuring the blue oval Ford logo and tagline, "Have You Driven A Ford Lately?," has been used for almost a decade in print and broadcast to promote all Ford nameplates.

Ford ads consist of three elements—the car, the headline and the logo—that follow prescribed guidelines. The car is always shown in an uncluttered environment with no other visual elements competing for attention. Headlines are designed to be fun to read: e.g., Mustang Convertible's "Open On Weekends." Finally, the logo and tagline are always displayed prominently but not to compete with the car.

1990's print campaign included almost 50 different executions for eight Ford nameplates. Half of these ads were for new model introductions and the rest for year-round support. Most insertions are spreads, with single-page ads used only for Mustang,

NUMBER OF NEWCOMERS IN THE TOP 10 1985-1990



Source: Video Storyboard Tests

Tempo and corporate efforts. Less than a half-dozen gatefold ads are produced, primarily for new line debuts.

Cited by readers as the most outstanding elements of Ford print ads are the cars themselves. Also contributing to recall of Ford advertising are local dealer ads, particularly when special rebate programs are involved. Best-retained of Ford's 1990 print crop were ads for Escort, followed by trucks, AeroStar, Mustang and Taurus.

10

MAYBELLINE
•Lintas

The cosmetics marketer, which has been ranked among the Top 10 Print Campaigns six of the past eight years, returns to this list after missing out in 1989.

The brand continued with its "Smart/Beautiful Maybelline" campaign but made it more reader-friendly. Although the practice of splitting the page horizontally was sustained from its 1988 introduction, headlines were added and copy blocks combined to create a more complete product story. The vast majority of Maybelline insertions are single pages with only an occasional spread.

The split page layout has gradually built retention among readers. Models are mentioned most frequently followed by the advertised products. Specifically retained were the colors of the featured nail polishes, eye make-up and lipsticks.

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What Do Readers Retain From Print Advertising?

	Men*	Women*	Under 35*	35 & Over*
EXECUTION	59%	71%	72%	60%
• Models	13	22	21	15
• Celebrities/Athletes	6	9	8	6
• Visuals/Photography/Colorful	20	19	19	20
• Product Advertised	11	18	16	14
• Layout of the Ads	7	3	5	5
• Multiple Page/Gatefolds	4	6	6	3
• Other Mentions	6	8	9	6
REACTION	29	30	30	30
• Eye-Catching/Appealing/Good/Interesting	8	11	5	13
• Informative	9	5	3	10
• Different/Unique/Daring	4	6	8	3
• Sexy/Romantic	3	3	6	1
• Modern/Sophisticated	2	3	4	2
• Motivating/Soft Sell	4	2	5	2
• Short/Direct	2	3	-	4
• Others	4	7	6	6
PRODUCT MESSAGE	21	18	17	22
• Low Prices	6	8	5	8
• Good/Quality/Best Product	8	2	3	7
• Like/Use the Product	4	6	4	6
• Product Demonstration	3	2	1	5
• New Styles/Products	2	2	2	2
• Free Samples	-	2	1	3
• Others	2	4	5	2

Source: Video Storyboard Tests
* Percentages add up to more than 100% because of multiple selections by respondents.

"Think of all the advertisements you've seen in magazines and newspapers in the past four weeks; Which one do you consider most outstanding?" When we asked this question in 1990, 74% of the respondents drew a complete blank (i.e., "none," "don't know," "can't remember any," "pay no attention to ads," etc.). Another 8% either remembered the brand but nothing else about the ad or recalled the ad but not the brand name. Less than 20% of the respondents remembered both the ad and the brand name. The above data, based on their responses, shows what they remember about print ads. The three categories of retained elements are: Execution (what was shown in the ad), Reaction (what they felt about the ad) and Product Message (what the ad said about the product).

Print: The Old Reliable Medium....from Page 1

("Everyday Low Prices"), the other chains produced value-oriented ads that scored heavily with consumers. The inability of these retailers to return to the Top 10 list doesn't mean that consumers have lost interest in value. Rather, the novelty of the message seems to have worn thin with consumers, plus retail advertising budgets have been scaled back as the industry goes through one of its toughest periods ever.

Another notable change on the 1990 print list was the ascension of Nike into the #1 ranking. The athletic footwear company also had the year's #2 television campaign, making it the first campaign to fare so well in both media. Infiniti's now-extinct "nature" campaign is another campaign that posted dual rankings in 1990: #6 in print and #10 in television. What the two campaigns had in common was their ability to capture the mood and spirit of their tv executions in print, instead of just transplanting visuals.

Absolut, one of the most-honored print campaigns in advertising history, also managed to break through with consumers in 1990.

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